



IRS DEBT RELIEF

A Workbook to Help
Resolve & Prevent Tax Debt

PGL3 Services LLC
Streamlined Finances. Strategic Growth.

IRS Debt Relief Workbook

- How to *Resolve & Prevent Tax Debt* -

This workbook will help you:

- ① Dig deeper into your current IRS debt situation
- ② Identify problems
- ③ Follow an action plan to resolve & prevent tax debt

SECTION 1 — Current Situation

- ☒ What tax years do you owe for? (list years) _____
- ☒ Federal tax owed: \$ _____
- ☒ State tax owed: \$ _____
- ☒ Any unfiled returns? [Yes / No] — If Yes, list which years _____

Reflection:

→ How long has this been an issue?

→ What caused the debt? (underpayment, poor cash flow, surprise bill?)

SECTION 2 — Identify Problems

- ☐ Unfiled returns
- ☐ Penalties adding up
- ☐ No cash reserves for taxes
- ☐ Inconsistent bookkeeping
- ☐ Not making estimated payments

Which apply to you? (check all that apply)

SECTION 3 — Action Plan

STEP 1: Pull IRS Transcripts

- ☐ Request Form 4506-T or use online IRS account
 - ☐ List all balances + penalties
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- ☐ Identify oldest unpaid year
-
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STEP 2: File All Missing Returns

- Year(s) to file: _____
- Assigned Tax Pro: _____
- Deadline for submission: _____
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STEP 3: Stop New Debt

- ☐ Pay current quarter's estimated taxes
- ☐ Setup auto-payment plan (if needed)
- ☐ Use % of revenue set aside monthly: _____%
-

STEP 4: Negotiate IRS Agreement

- Which option fits you:
- ☐ Installment Agreement
- ☐ Offer in Compromise
- ☐ Currently Not Collectible
- Pro to assist: _____
-

STEP 5: Long-Term Fix

- Monthly cash flow review: Scheduled? [Yes / No]
- % of income auto-saved for taxes: _____%
- Bookkeeper assigned: _____
- Tax planner engaged for next 12 months? [Yes / No]

SECTION 4 — Vision & Next Steps

12-Month Vision:

→ Fully resolved debt by: _____

→ Never owe taxes again because: _____

Next 3 Action Steps:

1. _____

2. _____

3. _____

Who will you partner with for success:

→ Tax professional: _____

→ Bookkeeper: _____

→ Tax attorney (if needed): _____

SECTION 5 - Special Offer

At PGL3, with 20+ years of experience, we make financial growth easy, efficient, and stress-free!

✦ Contact us today to book an appointment! **Your first 30-minute consultation is FREE!**

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